



State of Montana Project Management Office

Project Initiation and Planning Phase

Generic Project Plan Document Instructions

Introduction

This Project Plan Document template has been developed from a technical oriented project plan. However, most of the sections contained within the document should assist the project manager in producing a project plan for any project. The author of the document has annotated sections to convey their intent, so the outline can and should be adapted as appropriate for each situation.

Some people interchange the terms “project schedule” and “project plan.” In fact, the Project Plan expresses more than the schedule for the project. The high-level WBS and summary of key milestones are shown in the Project Plan, along with important project information well beyond the schedule.

The Project Plan is a communication document. It captures what the team understands the goals of the project to be, summarizes what the team has decided to do, how, and by when, and meet the goals established.

For large projects involving multiple organizations, the Project Plan document is useful for capturing all the major parameters of the project in one place and providing it to multiple organizations. It is important to understand that the plan can evolve. It should be used as a working document and communication tool during the early project investigation and planning work, as the team works through aspects of the project.

For smaller projects, a more streamlined version of the Project Plan can be created. The same benefits hold: clearly stating what the project must accomplish and how the team will do so, and making sure all the involved team members and their organizations are on the same page.

This template is intended to be a guide to begin the Project Plan document. The document outline is extensively annotated. Explanatory information is shown in italics, and should be removed when the template is used.

- Examine the standard outlines to determine what sections would be applicable to your project.
- Draft particular sections of the plan as the information comes available. Pay particular attention to sections such as communication, requirements management, and issues resolution, which could come into play even in the early days of the project as the team figures out an approach for meeting project goals within stated time and cost constraints.

- Evolve the plan during the investigation and planning work on the project.
- As decisions are made and the schedule, budget, and resource staffing solidifies, update the plan with summary information to reflect the scope, time, cost, and people aspects of the project.
- Alternatively, sections of information called for in the plan can be created as separate documents or as appendices. Remember the overall goal of communication; balance ease of reference for your immediate team against communication out to other groups with a stake in the project. Some teams like to keep a higher-level overview in a Project Plan document, with details of items such as the WBS and risk list maintained separately to post visibly on walls, send separately with status, etc.
- Provide the document to team members and managers in functional organizations that are supporting the project and review it with them to ensure understanding and support.
- Use the Project Plan Document as part of your process for this project being officially allowed to go forward. The plan should be dynamic, changing with the project changes, but keeping in line with the overall Project Vision or Charter agreed to for the project.

Administrative Information

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